Session 3: Module 2 - Manage Notes	
FINAL	
Description	**Text**
1. **Introduction**	Welcome to Session 3 Module 2 of the M-SPIRIT Required Online Training presented by the Montana Department of Public Health and Human Services WIC Program.
2. **Start**	Manage Notes
3. **ManageNotes1**	You can only view and create notes by clicking the Manage Notes option in the Participant Activities menu of the participant folder.
	M-SPIRIT has 4 types of notes: SOAP, General, BF or Breastfeeding, and System Notes.
4. **<notes>**	Click on Participant Activities.
5. **<notes_1>**	Select Manage Notes.
6. **<notes_2>**	<no script>
7. **<notes_3>**	The View Notes window opens where you can view, create and print notes.
	It displays notes only for the participant whose folder you are currently in.
	The first three types of notes listed in the Display section are SOAP, General and BF. These are all user-defined notes, or notes that you can create.
	Notes that are auto-generated by the system when certain functions are performed are called System Notes.
8. **SystemNotes**	There are five functions that currently create system notes: when benefits are mailed to a participant, when benefits are replaced, when an appointment reminder is sent via e-mail, when an Official Notification is produced via the Participant Folder and when a VOC document is produced.
9. **<notes_3A>**	The Display section at the top of the window allows you to filter the viewable notes by the note type.
	Currently, Finnegan has two types of notes displayed: SOAP and General. Click the General Note checkbox to remove the checkmark and see how it affects the notes displayed.
10. **<notes_4>**	When you remove the checkmark, that type of note is no longer displayed.
	Click on the SOAP Notes checkbox.
11. **<notes_5>**	Since Finnegan has neither of the types of notes' checked. There aren't any notes to view.

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	This can be helpful when there is a long list of notes and you are only interested in reviewing a specific kind of note, such as SOAP notes.
	Click the General Notes checkbox to add the notes back to the grid for viewing.
12. <notes_6>	Click the SOAP Notes checkbox to add these notes back to the grid also.
	The Notes for Household Member grid displays all of the notes for the individual participant.
13. <notes6A>	The Subject is limited to the topics available in a drop-down list when a note is created, which you'll see in a minute.
	The Application Area indicates what tab or screen you were in when you created the note.
14. <notes6B>	The Selected Note Text area displays the information in the note that is selected in the grid above.
15. <notes_7>	The Full Page View button opens a new window and displays the entire note for the note currently selected in the grid above.
	Click the Full Page View button.
16. <notes_8>	Click the Close button to exit the Full Page View window and return to View Notes.
17. SOAP	The SOAP note has a template that auto-populates information from the most recent certification and applicable information entered into the participant folder during the current cert period.
	All of the default information auto-populates in the Objective section.
18. <soap1>	Click the Create SOAP Note button.
19. <soap2>	The Subject of Note field defaults to SOAP and is disabled so that it cannot be changed.
	The SOAP note has an automatic template.
20. <soap3>	Again, the Application Area is the tab or screen you are in when the note is created.

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	The Protected checkbox locks a note from being viewed by staff without rights to view protected notes; all WIC staff roles currently have this right.
	In general, there is no reason to use this function.
21. <soap4>	We are going to type a quick note and then you need to click the OK button to save it.
	Click OK
22. <soap5>	Notice that the note we just saved did not automatically display.
	We could close the View Notes window and re-open it and it would display...or we could just click the Refresh button.
	Go ahead and click Refresh.
23. <soap6>	Now the note is displayed.
24. SOAP4	Once you've started a SOAP note, it must be completed before you can close the note window. You cannot save a draft of the note in M-SPIRIT.
	However, you do have an option if you cannot complete the note before your next appointment.
	You can cut and paste the currently unfinished contents of your notes and paste it into a WORD document. You can complete it in WORD and then paste it back into the SOAP note.
25. <gen>	Click the Create General Note button.
26. <genA>	Click the Subject of Note drop-down arrow.
27. <gen1>	The general note does not have any templates. It does, however, have a list of possible subjects for the note.
	Let's take a quick look at the possible note subjects.
28. <gen2>	You must always select a note subject...it is a required field.
	Go ahead and click on Other.
29. <gen3>	We'll just type a quick note.
	Click OK to save the note.
30. <gen4>	Once again, you have to click the Refresh button if you want the note to display in the grid without having to close the window.
31. <gen5>	<no script>

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32. BFNote	Since documenting the breastfeeding assessment, education and plan is important for continuity of care, when you are ready to document a breastfeeding contact you have a couple of options.
	You can include the breastfeeding documentation within a SOAP note. Or, your agency can choose to document breastfeeding information using the Breastfeeding notes.
	The breastfeeding note has an optional template that may be helpful in documenting assessment for a young infant
33. <bfnote>	We are going to create a breastfeeding note in Sadie Raindrop's folder since she is a breastfeeding infant.
	Where do we go to create notes? Click that menu.
34. <bfnote1>	Select Manage Notes.
35. <bfnote2>	<no script>
36. <bf>	To create a Breastfeeding Note, click on the Create BF Note button.
37. <bf1>	A message displays so that you can either choose to use the template or not.
	Click the Yes button to open the note with the breastfeeding template.
38. <bf2>	The template includes areas such as, "frequency of feeds, # of wet diapers, # of stools, etc." The topics in the breastfeeding template can be deleted if they aren't relevant.
	Like the General Note, you must select a subject from the Subject of Note drop-down list.
	Click the arrow on the drop-down to open the list.
39. <bf3>	Click BF Woman FU.
40. <bf4>	As with other templates, you can modify the breastfeeding template by highlighting the auto-populated text and pressing the Delete key on your keyboard or using the cut hot key Ctrl+X, or by using the right-click menu to cut.
	We are going to show you this by clicking and dragging our mouse over some unwanted text to highlight it...
41. <bf5>	<no script>
42. <bf6>	Now, you click and drag your mouse over the highlighted text and press the Delete key on your keyboard.

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43. <bf7>	Notice the highlighted text has been deleted.
	We'll just type some quick text into our note...
	...and you click the OK button to save and exit the note.
44. <bf8>	What do you have to do to view the note after you've saved it?
45. <bf9>	Yep. Click Refresh.
	So, what if you don't want to use the breastfeeding template?
	Click Create BF Note and we'll show you how to add a breastfeeding note without using the template
46. <bf10>	Remember this message? Just click the No button...
47. <bf11>	...and the Breastfeeding Note opens without any auto-populated template text.
	Click the Cancel button to exit.
48. <bf12>	You can also print notes from this screen.
49. PrintNote	Notes can be printed any time and include the type of note (SOAP, Breastfeeding or General) and the participant's name in the header, the note subject and the note text or content.
50. <print1>	That is all there is for managing user-defined notes. Click the Close button to exit.
51. Questions	Do you have any questions about what we just reviewed? If so, please submit them via the M-SPIRIT Frequently Asked Questions forum on the Montana WIC website.